VISIT TAMPA BAY

TREASURE AWAITS

2015 Winter Campaign Marketing & Media Effectiveness

Prepared by

H2R MARKET RESEARCH

Project Overview

PURPOSE

The purpose of this study was to measure the incremental impact Tampa Bay's Winter marketing campaign had on visitation and spending and to calculate a marketing ROI. The results of this study were compared to the 2014 Winter Campaign for context.

TARGET AUDIENCE

The Tampa Bay Winter Marketing & Media Effectiveness study was conducted among travelers living in select feeder markets. These markets included Chicago, Atlanta, Boston, Toronto, Detroit, Indianapolis and Dallas. The research was conducted in June of 2015 in order to capture the travel and spending that was generated as a direct result of the Winter Campaign (January-April) and provide an accurate measurement of the marketing ROI.

SAMPLE

A total of 1,202 respondents were interviewed for this Marketing & Media Effectiveness study. This sample size provides for a maximum margin of error of +/-2.8% at a 95% confidence interval overall, and +/-7.4% per individual market (sample size=approximately 175 per market).

Contents

Executive Summary

Marketing Efficiency

- Tampa Bay continued with their digital campaign in 2015 and also added billboards, radio, street teams and station domination campaigns this year. Overall awareness of Tampa Bay's Winter Marketing Campaign was good at 17.5%, but was a notable decline from last year's awareness of 24.0%. Extrapolated across the population of traveler households, this equates to approximately 2.2 million aware households across Tampa's target markets.

- While this is a decline from the 2.4 million aware households last year, it should be noted that fewer markets were advertised in this year. The markets targeted were similar; however, Baltimore and Washington, D.C. were dropped while Dallas was added. This decreased the number of census households targeted by nearly 2 million.

- With a gross media investment of more than $737k (+58% over 2014) in the Winter Campaign, Tampa Bay's cost per aware household averaged $0.33 overall (and $0.28 with the net investment of $625k).

Incremental Impact

- Despite smaller market reach, Tampa Bay's Winter Marketing Campaign increased incremental visitation to the area. Extrapolated across aware households, incremental visitation accounted for more than 31.5k (+0.4k over 2014) additional winter trips to the area. And, given travel spending of more than $1,000 per party, the campaign generated more than $38 million (+$8.9M) in incremental travel revenue.

- The campaign also benefited the local economy by generating more than 51k incremental room nights for the county of Hillsborough alone.

- Overall, Tampa Bay's Winter Marketing Campaign generated a Gross ROI of $52. This return was lower than the Gross ROI of $64 in 2014 despite the large increase in visitor spending this year. The increase in incremental revenue, while good, was not strong enough to offset the increased advertising investment. Finding the right balance for Tampa Bay's Winter Campaign investment will provide an ongoing challenge.

Advertising Evaluation

- Nearly 4 in 10 travelers found the advertisements appealing, with recent visitors (48%) once again finding them much more appealing than non-visitors (35%). More than half of visitors (53%) also indicated the ads made Tampa Bay seem more appealing as a destination.
- The primary messages taken away from the advertisements were that they make the area look like it's an easy place to visit for a quick getaway (49%) and that it has interesting new things to do that they'd like to explore (45%).
- The ads also had a positive impact on intent to visit the area in the next 12 months—increasing 1.2 percentage points overall after respondents were exposed to the ads.

Brand Promoters

- Traditional marketing methods are not working as well as they used to, and some believe the visitor experience has become one of the more productive marketing platforms. Satisfied visitors are good, but passionate brand advocates are better. Brand advocates are those visitors who go out of their way to provide positive brand testimony to others.

- Tampa Bay's Net Promoter Score declined (-10%) to 17% among those who visited the area since January 2015. This was fueled by an increase in the number of detractors (+9%) coming from the neutral category.

- Leveraging brand promoters (those individuals who are most likely to share their experience with friends/family) helps generate buzz in the marketplace. Identifying these individuals and giving them the tools to more easily promote/recommend Tampa Bay may help extend market reach efficiently and help the ads have a bigger impact. Brand advocates for Tampa Bay in the winter are more likely to have children and earn higher household incomes than non-visitors.

Thoughts to Consider

- Promoting the Tampa area to visitors most like your brand promoters will likely help increase visitation among those most satisfied with the area. In fact, research indicates that customers gained through referrals are up to four times more valuable than customers gained through other means. Hence, a positive visitor experience not only helps improve traveler retention, but it may also be the most valuable tool in the marketer's acquisition arsenal as well.*

- Additionally, Tampa Bay should continue searching for the appropriate balance between the size of advertising investment and the return that spending generates. While the marketing increased incremental spending for the area, it wasn't enough to offset the additional marketing dollars spent on the campaign. With two years of data for this campaign, the better markets are beginning to rise to the top while the lower performing ones can perhaps be eschewed. Toronto and Chicago continue to perform well, while Indianapolis saw the biggest decline in return as well as one of the lowest returns on investment this year.

**Source: What's Your Purple Goldfish, Stan Phelps.*

Tampa Bay Winter Campaign
Key Performance Indicators (KPI) Summary

Tampa Bay's Winter Marketing Campaign generated a Gross ROI of $52 while net spending without media commissions produced a Net ROI of $62.

These returns are lower than what was generated in 2014 and also lower than the norm for destinations with similar marketing budgets. However, most destinations with marketing budgets similar to Tampa Bay have not been advertising quite as far away. With the exception of a few, most advertise within 300 miles of their destination. Therefore, this ROI may very well be within acceptable norm.

Overall, the marketing message reached a total of 2.2M million traveler households at a gross cost of $0.33 (net $0.28) per household. Anything below a cost of $0.50 per household is considered very efficient by industry standards.

Key Performance Indicator	Gross Spending	Net Spending*	NORM**
Aware Households	2.2M	2.2M	1.1M
Increment	+1.4%	+1.4%	+5.5%
Incremental Trips	31.5k	31.5k	47.7k
Incremental Revenue	$38.6M	$38.6M	$28.8M
Media Investment	$737k	$625k	$402k
Cost/Aware Household	$0.33	$0.28	$0.48
Return on Investment	$52	$62	$78

**Net Spending does not include Media Commissions paid for the Winter Marketing Campaign*
***Paid Media Norm for destinations with marketing budgets <$1.0 million*

Tampa Bay Winter Campaign – Gross Media Trends

Tampa Bay's 2015 Winter Marketing Campaign generated more incremental visits and more incremental revenue than was measured for the 2014 Winter Campaign.

However, because Tampa Bay spent $270k more on the Winter Campaign this year, the cost per aware household was slightly higher and the return slightly lower. Finding the balance of investment that will generate more revenue at a lower cost and greater return will be key to long-term success.

Gross Paid Media Spending	Winter 2014	Winter 2015	Variance
Aware Households	3.1M	2.2M	-0.9M
Incremental Visitation	+1.0%	+1.4%	+0.4%
Incremental Trips	31.1k	31.5k	+0.4k
Incremental Revenue	$29.7M	$38.6M	+$8.9M
Media Investment	$467k	$737k	+$270k
Cost/Aware Household	$0.15	$0.33	+$0.18
Return on Investment	$64	$52	-$12

Tampa Bay Winter Campaign – Net Media Trends

The net investment (minus media commissions) in the 2015 Winter Campaign also increased trips and revenue compared to 2014, as well as an increased cost per household and decreased return.

Net Paid Media Spending	Winter 2014	Winter 2015	Variance
Aware Households	3.1M	2.2M	-0.9M
Incremental Visitation	+1.0%	+1.4%	+0.4%
Incremental Trips	31.1k	31.5k	+0.4k
Incremental Revenue	$29.7M	$38.6M	+$8.9M
Media Investment	$404k	$625k	+$221k
Cost/Aware Household	$0.13	$0.28	+$0.15
Return on Investment	$74	$62	-$12

Marketing Efficiency

+ *Aided paid media awareness*
+ *Marketing & Media reach*
+ *Marketing efficiency*

01

MARKETING EFFICIENCY KPIs

17.5% of travelers have seen or heard a Tampa Bay Winter Advertisement

Tampa Bay's Winter Campaign marketing reached **2.2 million** households

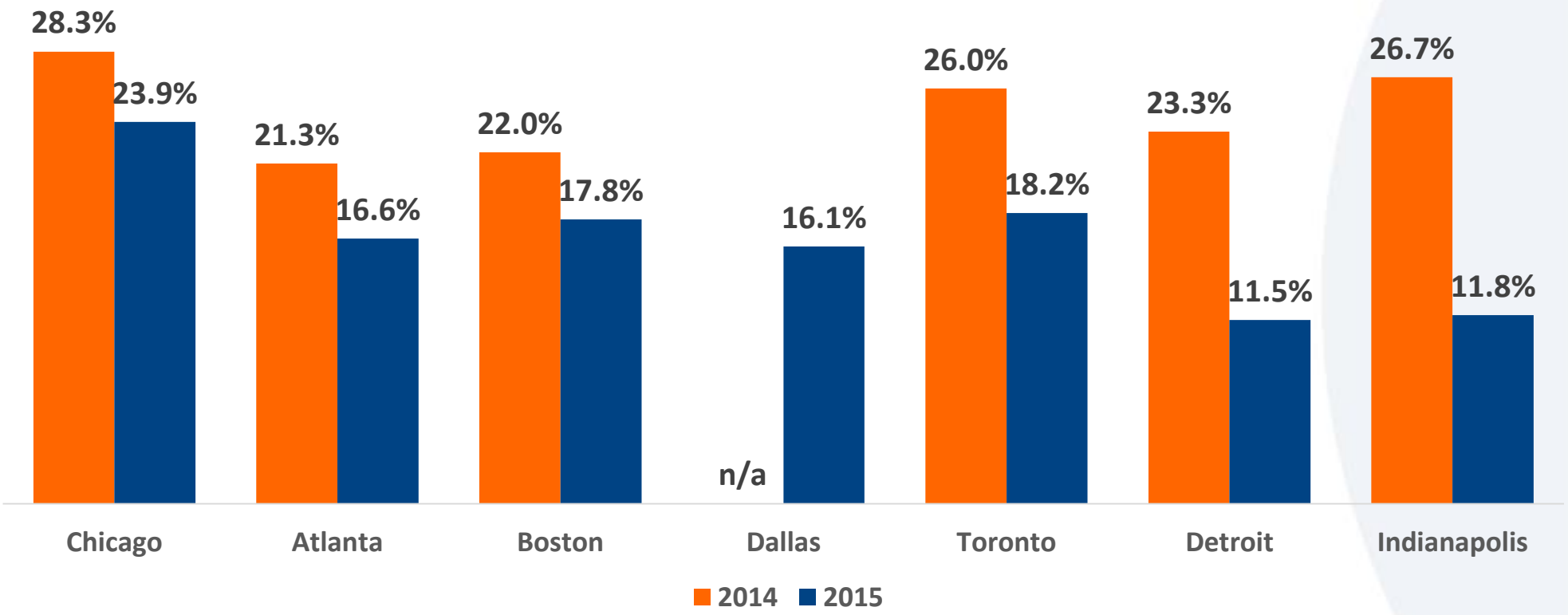
The gross cost per aware household averaged **$0.33**

Tampa Bay invested **$737k** in Gross Advertising for the Winter Campaign

KPIs = Key Performance Indicators

Overall Marketing & Media Awareness

Overall marketing and media awareness for the Winter Campaign was 17.5%—nearly a 7 point decline from 2014 awareness of 24.0%. However, the campaign was all new this year, which accounts for the decline in awareness. Dallas, a new market replacing Washington, D.C., and Baltimore, had a higher awareness than some of the more established markets, but not quiet as high as the markets they replaced (23% & 19% respectively).

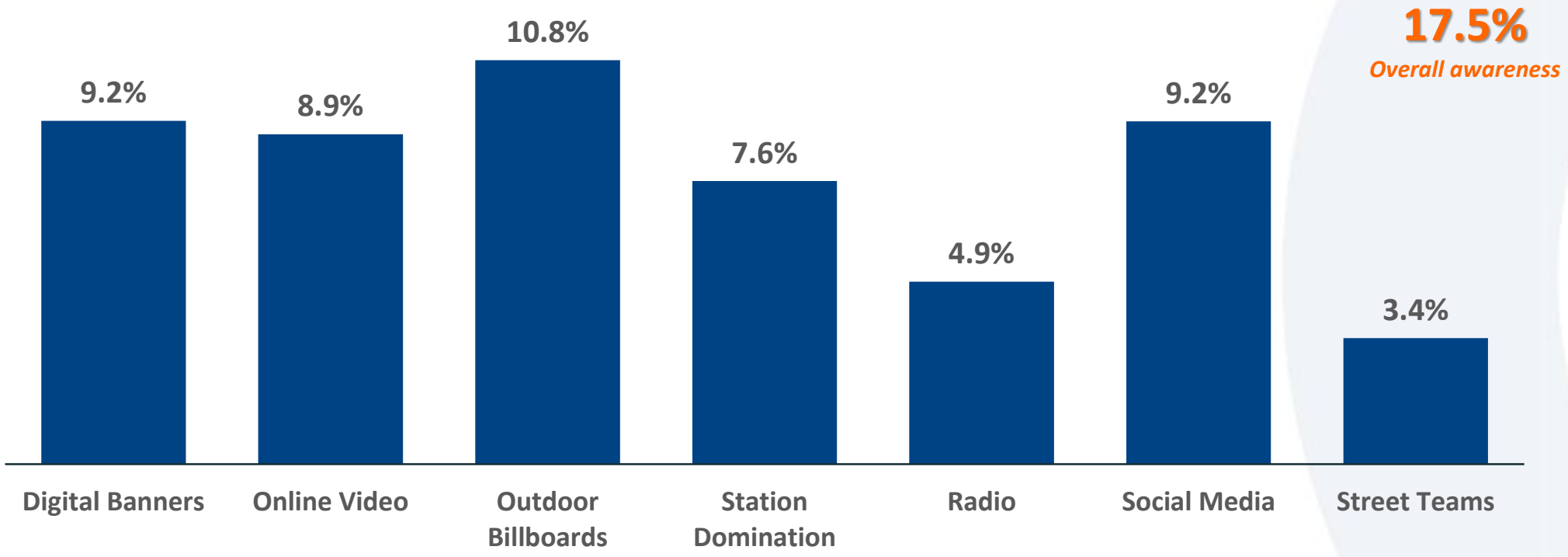


Q22-28: Have you seen this advertisement?

RESPONDENT BASE: ALL RESPONDENTS | N=1,202

Awareness by Individual Advertisement/Channel

Outdoor billboards and social media garnered the highest awareness for the Winter Campaign, while the street teams in Chicago and Dallas weren't as memorable. This isn't surprising considering travelers likely see billboards more often while fewer may have had the opportunity to encounter the street teams.



Q22-28: Have you seen this advertisement?

RESPONDENT BASE: ALL RESPONDENTS | N=1,202

Market Reach (Aware Traveler Households)

Tampa Bay's Winter Marketing Campaign generated a market reach of 2.2 million traveler households, or 17.5% of travelers in these target markets.

However, the market reach was significantly lower than it was for the 2014 Winter Campaign. New campaigns generally take 2-3 years to gain their full awareness potential, so lower awareness with a new campaign is not surprising.

Market	Total Ad Awareness	Total Market Reach	+/- 2014
Atlanta	16.6%	345k	-60k
Boston	17.8%	376k	-44k
Chicago	23.9%	669k	-190k
Dallas	16.1%	367k	n/a
Detroit	11.5%	174k	-162k
Indianapolis	11.8%	116k	-84k
Toronto	18.2%	172k	-28k
Total Market	**17.5%**	**2.2M**	**-0.9M**

Digital Advertising is Tampa's Primary Reach Vehicle

The digital advertising efforts provided the primary reach vehicle(s) for Tampa Bay's marketing campaign—generating the highest awareness at the lowest cost.

It is worth noting, the total number of aware households in the table to the right does not equal the sum of the individual media's aware households due to the duplication that occurs in media overlap. That is, some respondents were inherently aware of multiple ads/media channels.

Medium	% Aware of Ads	Aware HHs	Gross Cost/HH
Digital Banners	9.2%	1.2M	$0.09
Online Video	8.9%	1.1M	$0.09
Outdoor Billboards	10.8%	0.8M	$0.27
Station Domination	7.6%	0.2M	$0.70
Radio	4.9%	0.05M	$0.72
Social Media	9.2%	1.2M	$0.08
Street Teams	3.4%	0.2M	$0.29

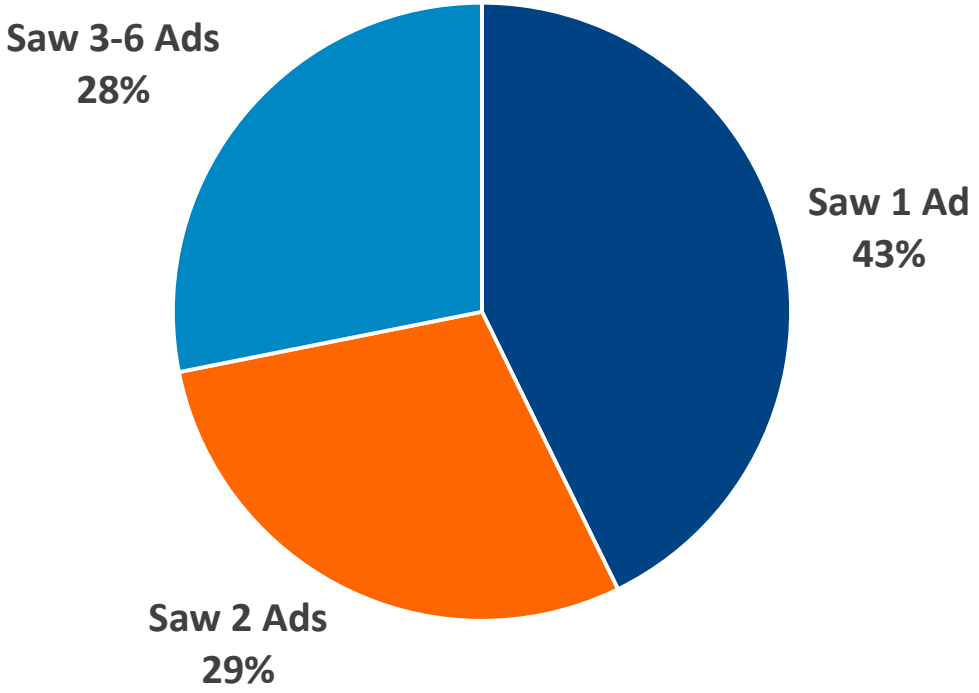
Q22-28: Have you seen this advertisement?

RESPONDENT BASE: ALL RESPONDENTS | N=1,202

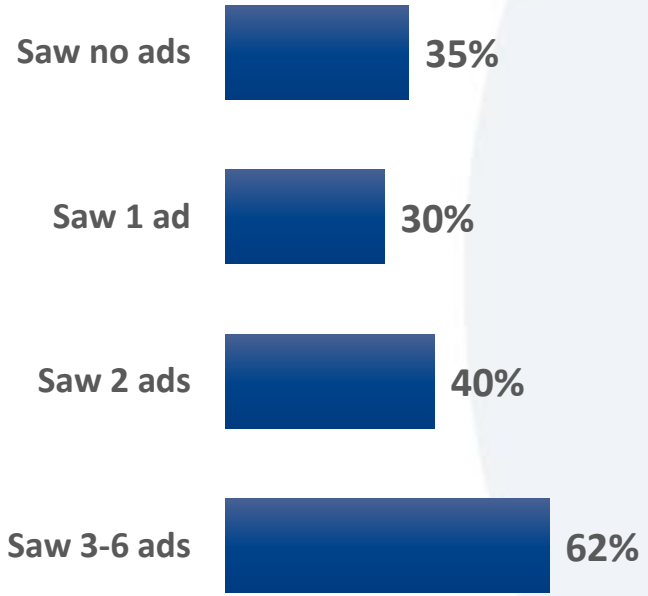
Media Overlap

A marketing campaign performs better when those in the target market can be reached multiple times and/or through multiple channels. This is true for Tampa Bay, as the more ads travelers were exposed to the more likely they were to visit in Winter 2015.

Campaign Exposures



Level of Visitation



Q22-28: Have you seen this advertisement?

RESPONDENT BASE: ALL RESPONDENTS | N=1,202

GROSS Marketing Efficiency (Cost per Aware Household)

The Tampa Bay Winter Marketing Campaign efficiently reached travelers in these target markets.

Tampa bay spent 58% more marketing on the Winter Campaign compared to 2014. While the number of households reached was fewer, there were only 7 markets compared to 8 last year. The cost per aware household was still very efficient at just $0.33 overall.

Market	GROSS Spending	+/- 2014	Total Market Reach	GROSS Cost/HH	+/- 2014
Atlanta	$100,897	+$29k	345k	$0.29	+$0.11
Boston	$42,074	-$18k	376k	$0.11	-$0.03
Chicago	$217,362	+$110k	669k	$0.33	+$0.21
Dallas	$212,760	n/a	367k	$0.58	n/a
Detroit	$42,074	+$3k	174k	$0.24	+$0.12
Indianapolis	$79,907	+$58k	116k	$0.69	+$0.58
Toronto	$42,074	-$7k	172k	$0.25	+$0.01
Total Market	**$737,146**	**+$270k**	**2.2M**	**$0.33**	**+$0.19**

NET Marketing Efficiency (Cost per Aware Household)

The net investment for Tampa Bay excludes media commissions paid.

The NET cost per aware household was $0.28—slightly lower than the GROSS cost per aware household. This is considered excellent compared to the Gross Industry Norm of $0.48 per aware household for DMOs with marketing budgets of <$1.0 million that have used multiple media channels.

Market	NET Spending*	+/- 2014	Total Market Reach	NET Cost/HH	+/- 2014
Atlanta	$85,762	+$24k	345k	$0.25	+$0.10
Boston	$35,763	-$16k	376k	$0.10	-$0.02
Chicago	$185,108	+$93k	669k	$0.28	+$0.17
Dallas	$181,196	n/a	367k	$0.49	n/a
Detroit	$35,763	+$2k	174k	$0.21	+$0.11
Indianapolis	$65,721	+$46k	116k	$0.57	+$0.47
Toronto	$35,763	-$7k	172k	$0.21	$0.00
Total Market	**$625,074**	**+$270k**	**2.2M**	**$0.28**	**+$0.16**

Incremental Impact

+ *Incremental travel*
+ *Incremental trips*
+ *Incremental travel spending*
+ *Return on Investment (ROI)*

02

MARKETING RETURN KPIs

Tampa Bay's Winter Marketing Campaign resulted in **31.5k** incremental trips

$38.6 million in incremental travel spending

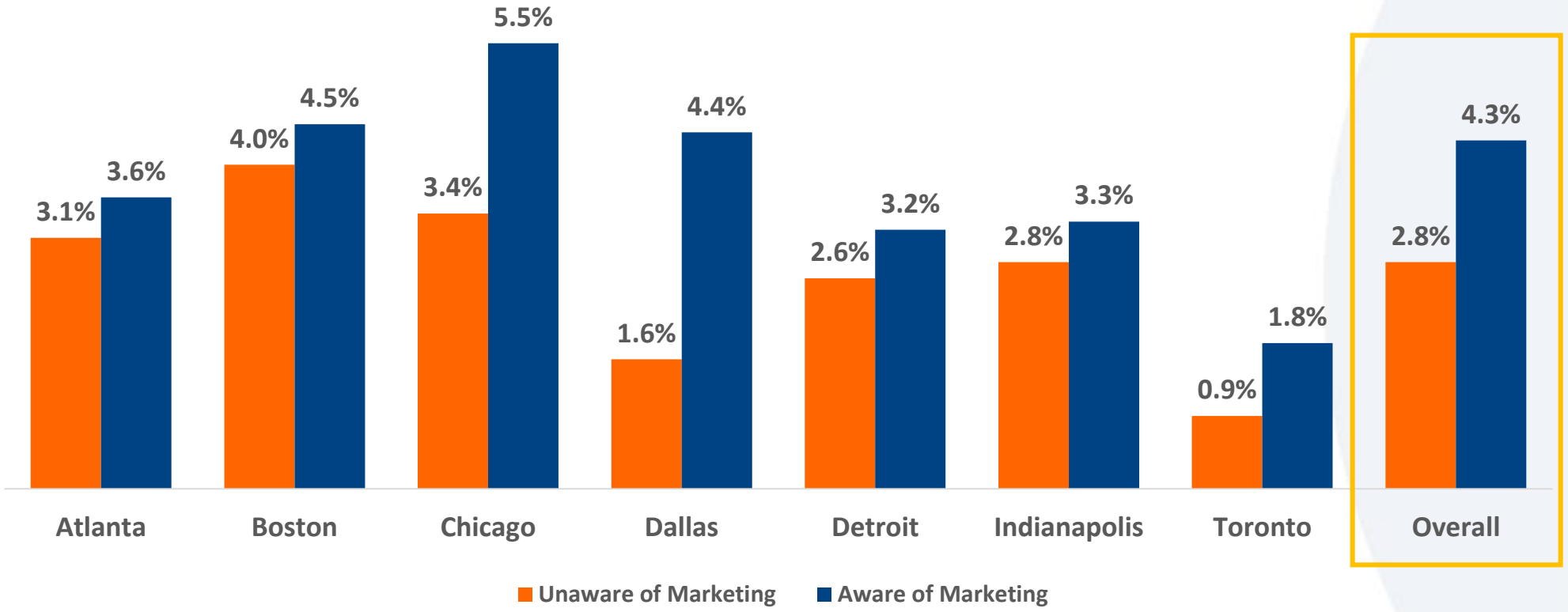
Incremental room nights totaled **51.3k**

Tampa Bay invested **$737k** in gross marketing expenditures

Gross ROI was $52
Net ROI was $62

Visitation to Tampa Bay by Feeder Market

Tampa Bay's Winter Marketing Campaign generated some incremental visitation in all of the geographic markets evaluated. Visitation levels from aware travel households were particularly strong in Chicago and Dallas.



Q8W: Have you visited Tampa (the shaded area on the map above) since January of 2015?

RESPONDENT BASE: TAMPA BAY VISITORS SINCE JANUARY 2015 | N=94

Incremental Visitation

Overall, Tampa Bay's Winter Marketing campaign generated 31.5k incremental household trips that would not have occurred otherwise.

Incremental visitation was strongest in Chicago and Dallas. However, Indianapolis was the lowest performer, dropping 3.1k households from Winter 2014.

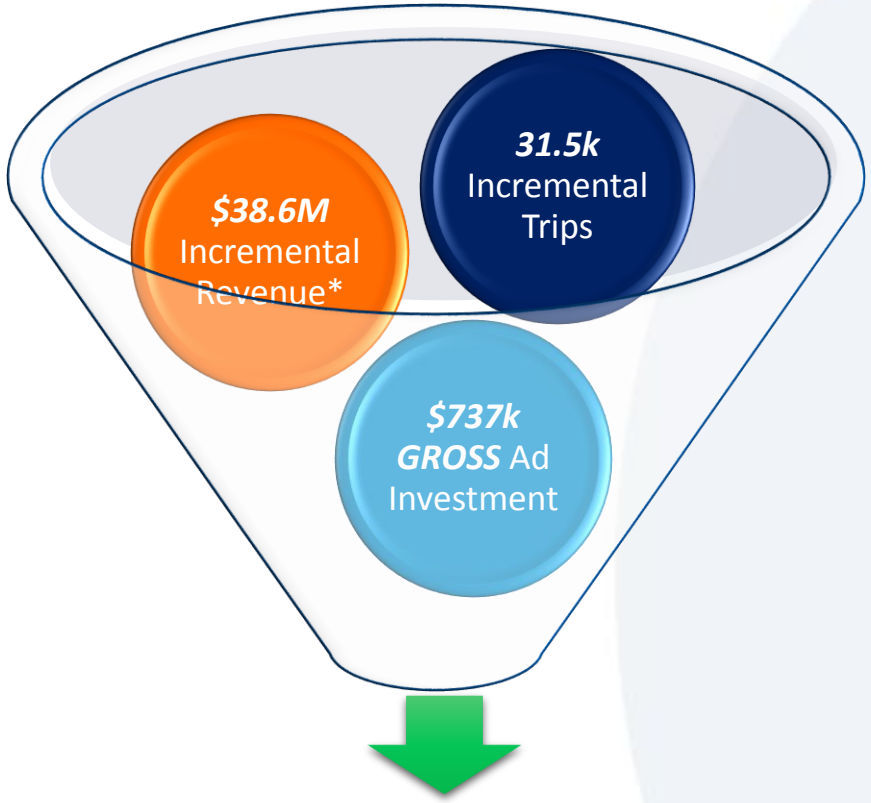
Market	Total Market Reach	Incremental Travel	+/- 2014	Incremental HH Trips	+/- 2014
Atlanta	345k	0.4%	-0.6%	1.5k	-2.5k
Boston	376k	0.5%	-1.5%	1.9k	-6.4k
Chicago	669k	2.1%	1.0%	14.1k	+4.2k
Dallas	367k	2.9%	n/a	10.6k	n/a
Detroit	174k	0.7%	0.3%	1.2k	-0.04k
Indianapolis	116k	0.6%	-1.2%	0.6k	-3.0k
Toronto	172k	1.0%	0.2%	1.7k	+0.1k
Total Market	**2.2M**	**1.4%**	**0.4%**	**31.5k**	**+0.4k**

Tampa Bay's Winter Marketing Campaign generated a GROSS ROI of $52 for every dollar invested.

Party Trip Spending

$1,223

Winter 2014: $956



$52 GROSS Return on Investment

$625k NET Ad Invest | $62 NET Return on Investment

*Incremental revenue is the revenue generated that, without advertising, would not have occurred.

RESPONDENT BASE: TAMPA BAY VISITORS SINCE JANUARY 2015 | N=94

Incremental Traveler Spending & ROI

Tampa Bay's Winter Marketing Campaign produced incremental spending that was nearly $9M higher than the incremental spending produced in Winter 2014.

However, the incremental spending did not outweigh the increase in investment this year. The return on both the gross and net investments declined by $12 compared to 2014. The key will be finding the balance of increasing the investment while also increasing return.

Market	Incremental Spending	+/- 2014	GROSS ROI	+/- 2014	NET ROI	+/- 2014
Atlanta	$0.75M	-$1.6M	$7	-$25	$9	-$29
Boston	$2.3M	-$5.7M	$54	-$78	$63	-$91
Chicago	$17.4M	+$6.1M	$80	-$26	$94	-$29
Dallas	$12.3M	n/a	$58	n/a	$68	n/a
Detroit	$1.3M	+$0.1M	$31	+$.44	$37	+$1
Indianapolis	$0.67M	-$2.3M	$8	-$127	$10	-$147
Toronto	$3.9M	+$1.8M	$94	+$53	$110	$61
Total Market	**$38.6M**	**+$8.9M**	**$52**	**-$12**	**$62**	**-$12**

Incremental Benefit to Hillsborough County

Approximately 3 in 10 travelers stayed overnight in Hillsborough County during their visit.

Extrapolated across total incremental visitation and spending in the Greater Tampa Bay area, Hillsborough County generated nearly 10k of those 31.5k incremental visits and more than $11.7 million of the incremental $38.6 million that was earned.

Market	% Spent Night In	Incremental Visits	Incremental Revenue
Hillsborough County	**30%**	**9.6k**	**$11.7M**
Orange County	16%	4.9k	$6.1M
Sarasota County	19%	5.9k	$7.2M
Pinellas County	28%	8.9k	$10.9M
Other	7%	2.2k	$2.7M
Total Market	**100.0%**	**31.5k**	**$38.6M**

Incremental Room Nights

**The Winter Marketing Campaign generated more than 159k incremental room nights for the entire Greater Tampa Bay area. Of those, 51.3k were overnight stays in Hillsborough County.*

The Winter Marketing Campaign generated more than 51k incremental *room nights* from those staying overnight in Hillsborough County at a Hotel/Motel, Bed & Breakfast, Condo, Cabin, Cottage or Resorts that would not have occurred otherwise.

Extrapolated across the number of rooms purchased and length of stay, it is estimated that the Winter Marketing Campaign generated approximately 9% of the total room nights utilized by travelers in Hillsborough County during this timeframe.

RESPONDENT BASE: OVERNIGHT VISITORS WHO STAYED IN TAMPA BAY | N=68

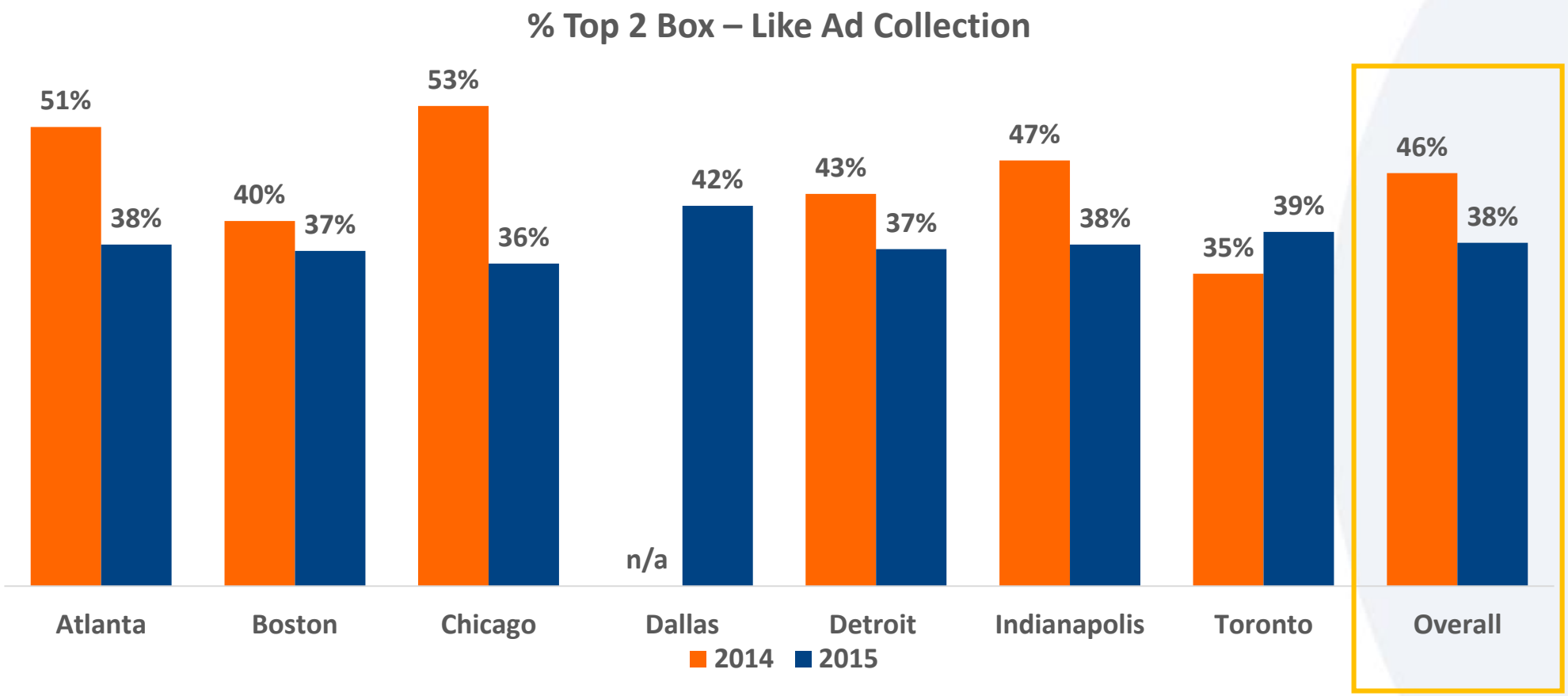
Advertising Evaluation

+ *Ratings of creative appeal*
+ *Impact on consumer behavior*
+ *Marketing messages' impact on intent to visit*

03

Likeability of Advertisements

Overall, 38% of travelers indicated they like the winter advertising collection, significantly lower than the H2R Industry Norm of 59%. The new ad collection seemed to resonate most with Dallas travelers.

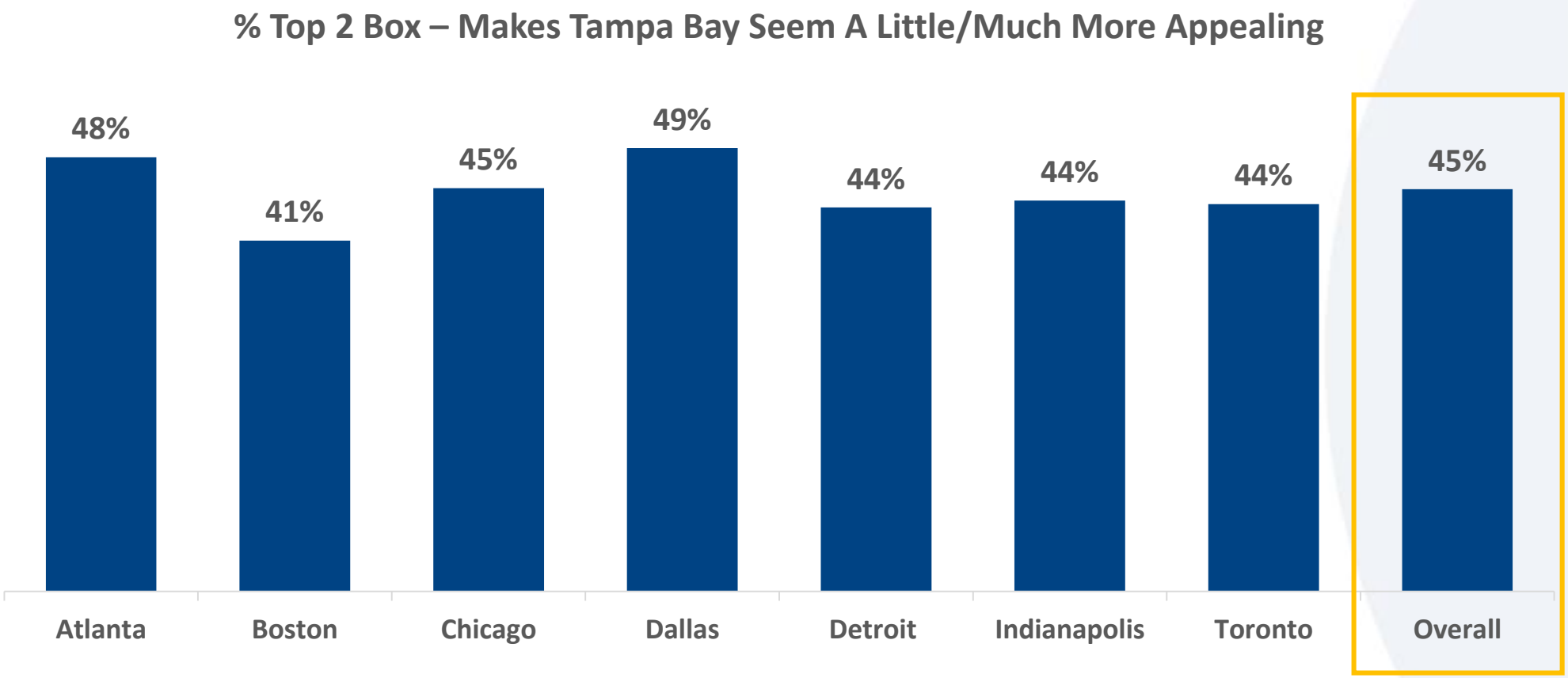


Q28: Using the scale provided, please rate how much you like this collection of advertisements for Tampa Bay.

RESPONDENT BASE: ALL RESPONDENTS | N=1,202

Impact on Appeal of Tampa Bay

Additionally, less than half of travelers indicated the ads made Tampa Bay seem more appealing, also much lower than the H2R Industry Norm of 64%.

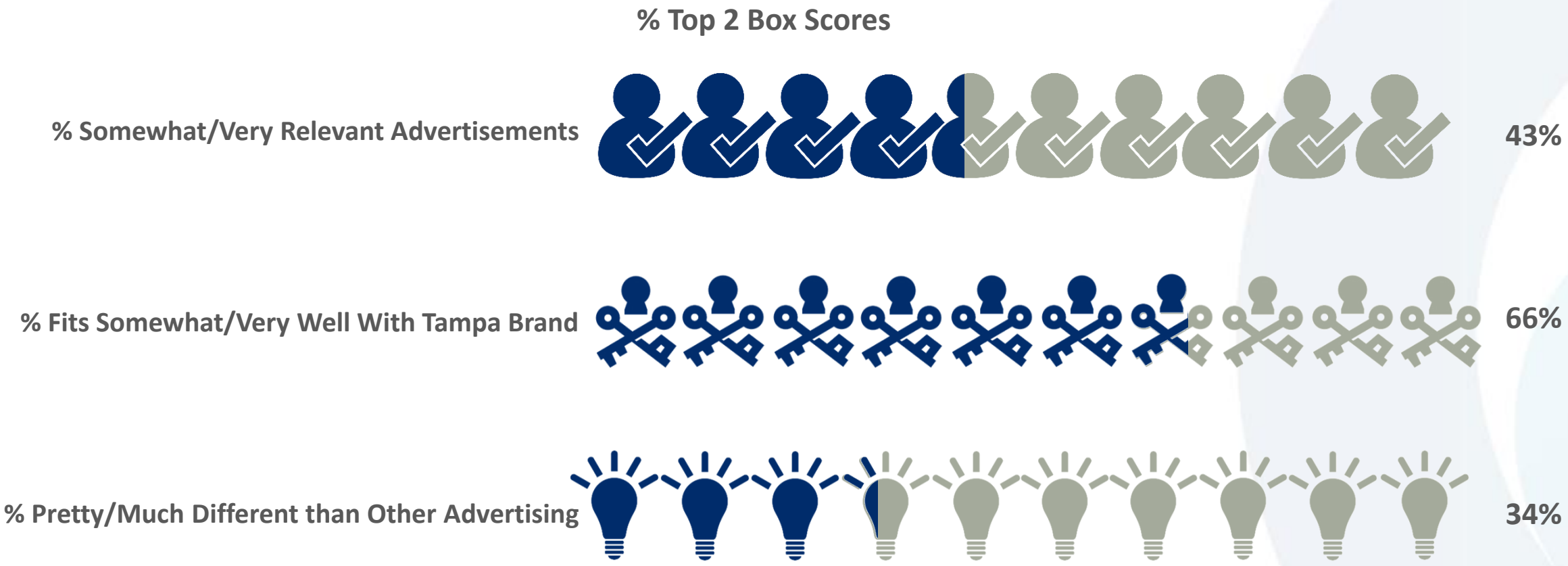


Q29: Using the scale provided, please indicate the degree to which these ads make Tampa Bay seem more appealing to you:

RESPONDENT BASE: ALL RESPONDENTS | N=1,202

Relevance, Brand Fit and Differentiation

The Tampa Bay winter ads fit with the Tampa brand very well but aren't as relevant or differentiated as other ads travelers have seen.

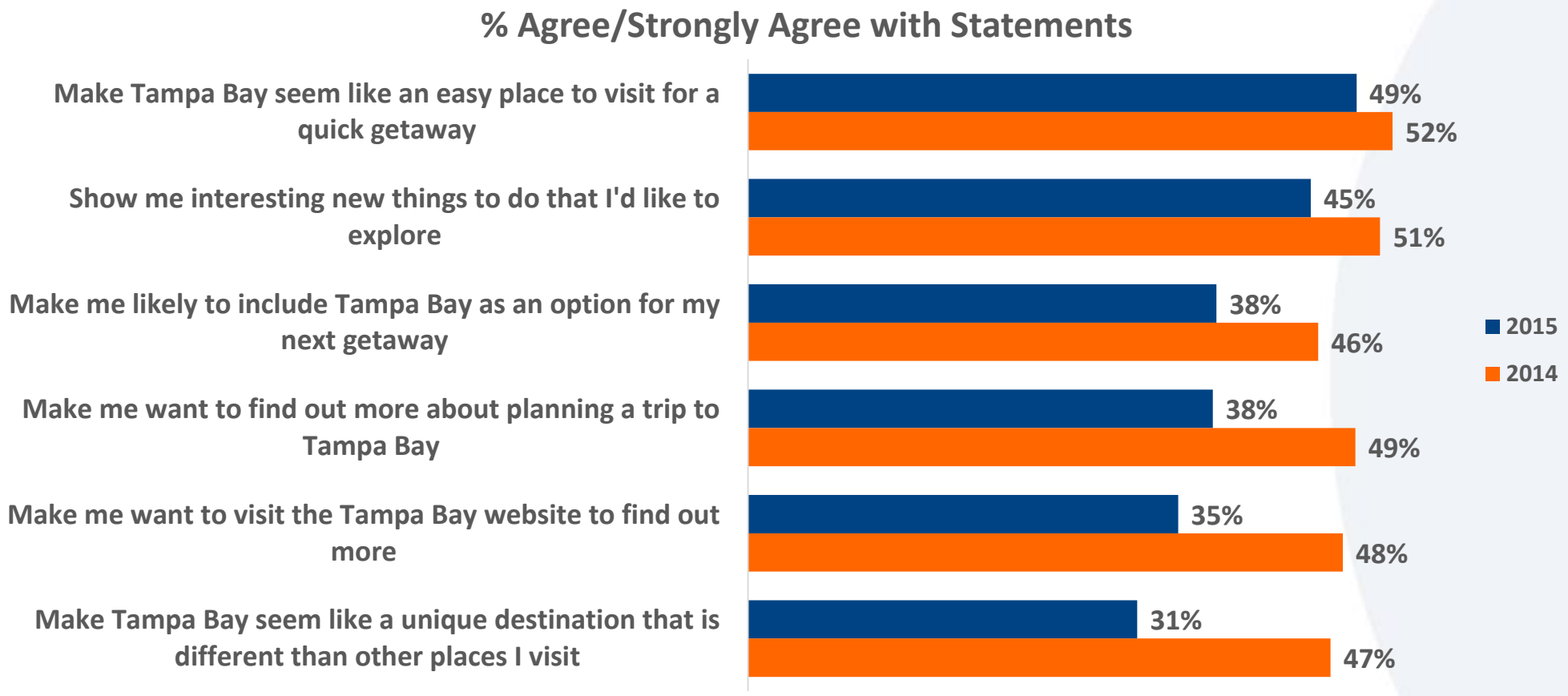


Q30: Using the scale provided, please rate how relevant the points made in these advertisements are to you:
Q31: Using the scale provided, please rate how well this advertisement fit with what you think about Tampa:
Q32: Using the scale provided, please indicate how different this advertisement is from other advertising you've seen for destinations:

RESPONDENT BASE: ALL RESPONDENTS | N=1,202

Traveler Takeaways from the Advertising Message

Tampa Bay's 2015 ads still do a good job of making the area seem like an easy place for a quick getaway; however, the other takeaways were significantly lower than the 2014 Winter Campaign.



Q33: Based upon the message you took away from the advertisements you just reviewed, please indicate the degree to which you agree that these ads:

RESPONDENT BASE: ALL RESPONDENTS | N=1,202

Post-Ad Exposure Traveler Intentions

The actions that travelers are most likely to take after being exposed to these ads are to search online for information on the area and/or visit the Tampa Bay website—both of which are great ways to get new information to travelers.

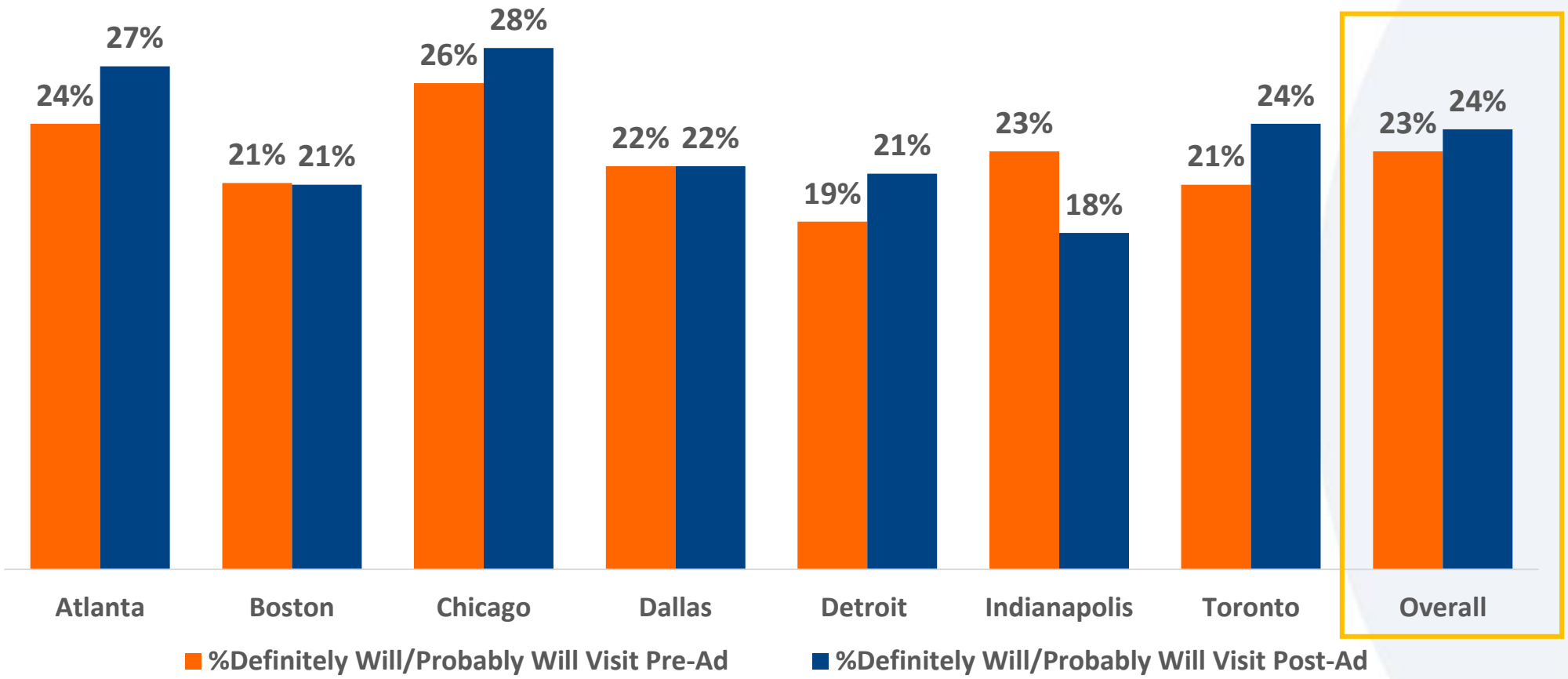
% Probably/Definitely Would…

Q34: After reviewing these ads, how likely would you be to take each of the following actions?

RESPONDENT BASE: ALL RESPONDENTS | N=1,202

Intent to Visit – Pre- and Post-Ad Exposure

The 2015 Winter Marketing Campaign generated a lift in intent to visit for more than half of the markets, with Boston and Dallas staying equal and Indianapolis' intent falling by 5%.

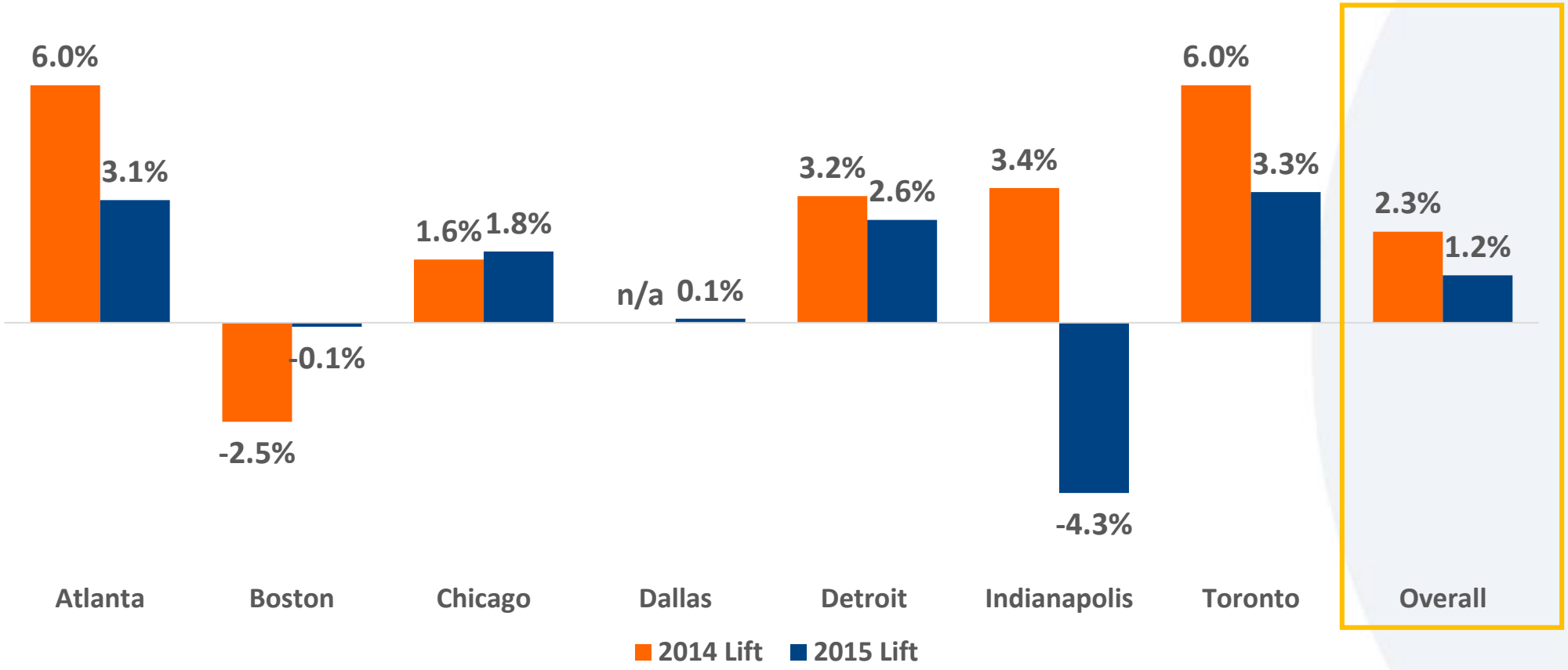


Q7: Using the scale provided, please indicate how likely you are to visit each of the following destinations in the next 12 months:
Q35: Using the scale provided, please indicate how likely you are to visit the Tampa area in the next 12 months?

RESPONDENT BASE: ALL RESPONDENTS | N=1,202

Intent to Visit Lift – 2014 vs. 2015

The lift in 2014 was much stronger for many of the markets. Additionally, the negative lift in Indianapolis offset the strong positive lift seen last year.



Q7: Using the scale provided, please indicate how likely you are to visit each of the following destinations in the next 12 months:
Q35: Using the scale provided, please indicate how likely you are to visit the Tampa area in the next 12 months?

RESPONDENT BASE: ALL RESPONDENTS | N=1,202

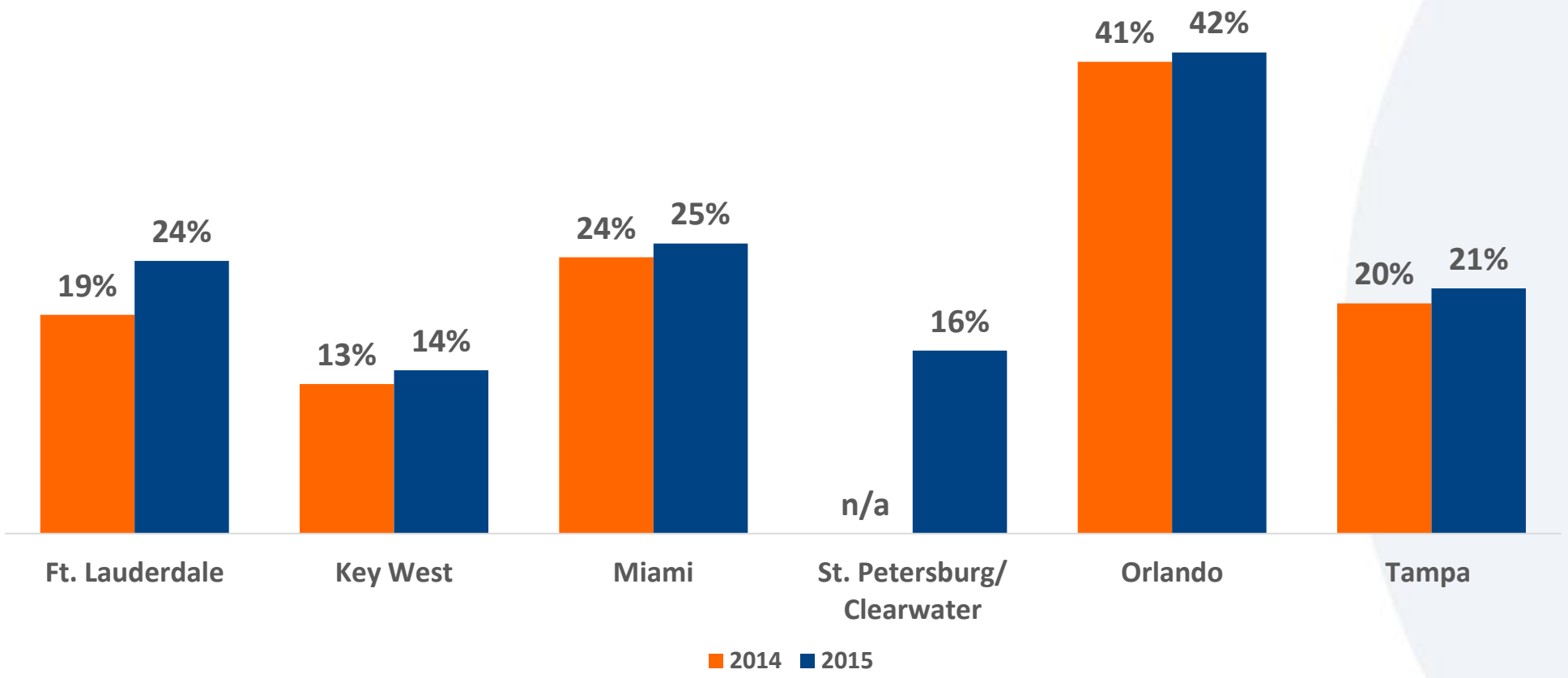
Travel Landscape

+ *Competitive travel landscape*
+ *Making travel plans*

04

Destinations Visited in the Past 3 Years

People are more willing to travel in 2015, and travelers in Tampa Bay's target markets traveled more this winter. Orlando was the most popular destination to visit in Tampa's competitive set; however, Ft. Lauderdale saw the biggest increase in visitation from last year (+5%).

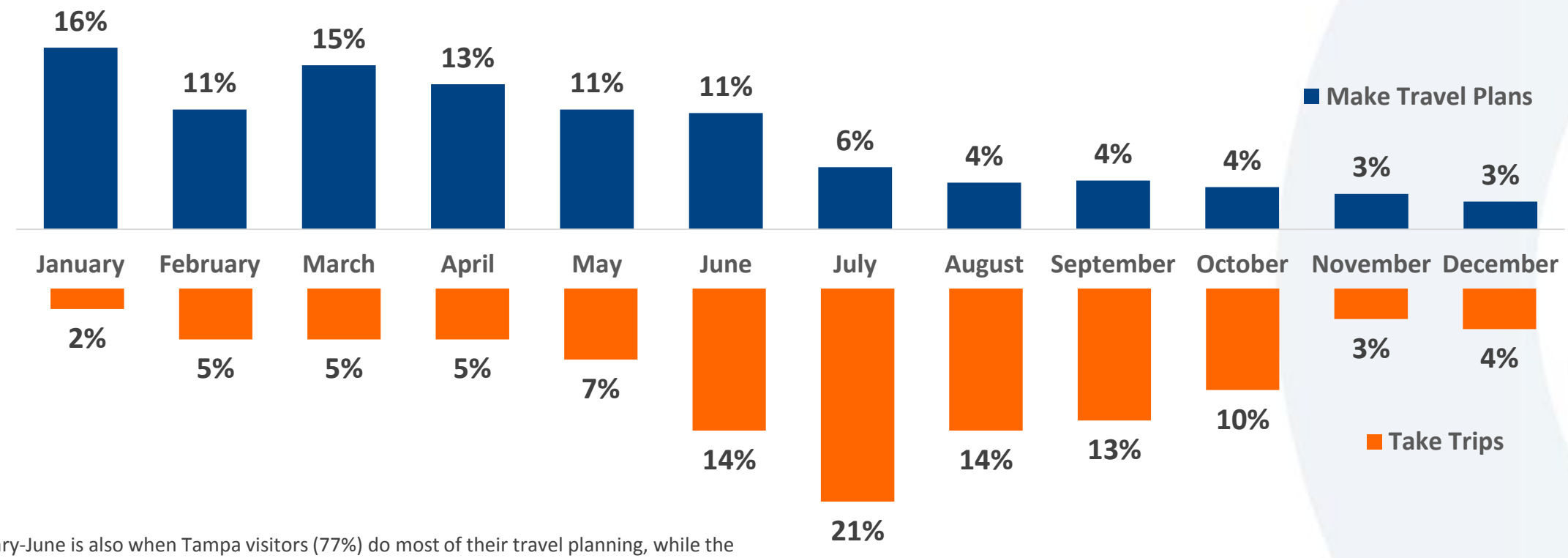


Q6: Please indicate which of these destinations, if any, you have visited in the past 3 years:

RESPONDENT BASE: ALL RESPONDENTS | N=1,202

Time of Year Make/Take Leisure Travel Plans

Travelers in Tampa Bay's target markets tend to do most (77%) of their travel planning from January through June. However, most trips are taken in the June-September window*.



*January-June is also when Tampa visitors (77%) do most of their travel planning, while the biggest surge in taking leisure trips comes in July (21%).

Q5: What time of year do you generally make your leisure travel plans and then travel for leisure?

RESPONDENT BASE: ALL RESPONDENTS | N=1,202

Top of Mind Awareness

Tampa Bay has little top of mind awareness in their target markets; however, there was a slight up-tick in the rankings compared to Winter 2014 (61st vs. 80th last year).

Rank	Destination	Awareness
1	Florida	4.9%
2	New York	4.3%
3	Chicago	4.1%
4	Las Vegas	2.6%
5	Hawaii	2.2%
…61	Tampa Bay	0.3%

Q4: When you think of places you have visited, or would enjoy visiting, for leisure that are located in your region, which destinations first come to mind?

RESPONDENT BASE: ALL RESPONDENTS | N=1,202

Tampa Bay Traveler Profile

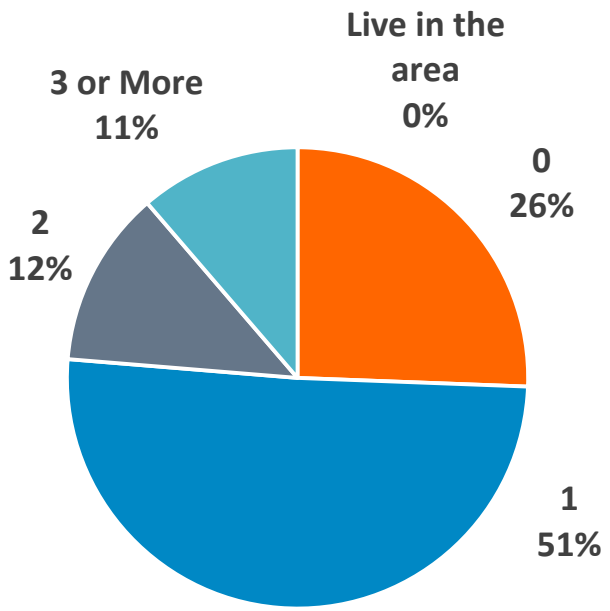
+ *Tampa Bay traveler behavior*
+ *Activity participation and functional drivers*
+ *Accommodations, length of stay and more*
+ *Tampa Bay visitors' demographic profile*

05

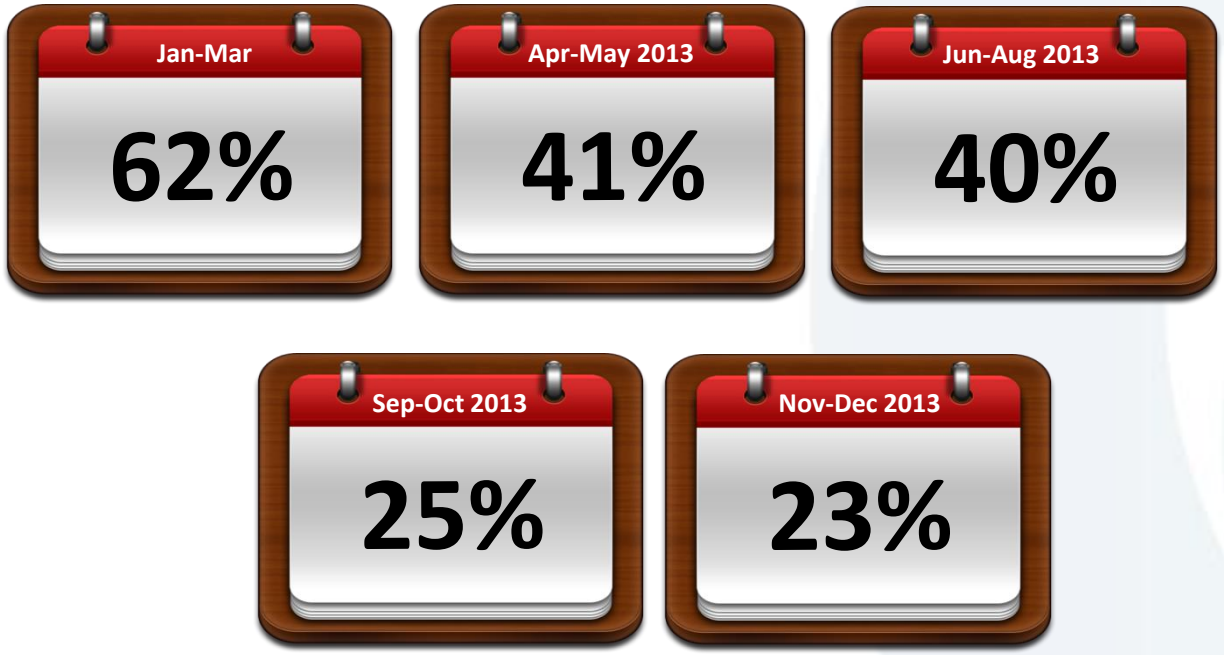
Seasonality & Frequency of Visitation

In the last 3 years, the January-March timeframe was the most popular months for Tampa Bay visitors. In the past 12 months, travelers visited the Tampa Bay area an average of just once.

Number of Trips in Past 12 Months – 1.2



Months Visited Tampa Bay in the Past 3 Years

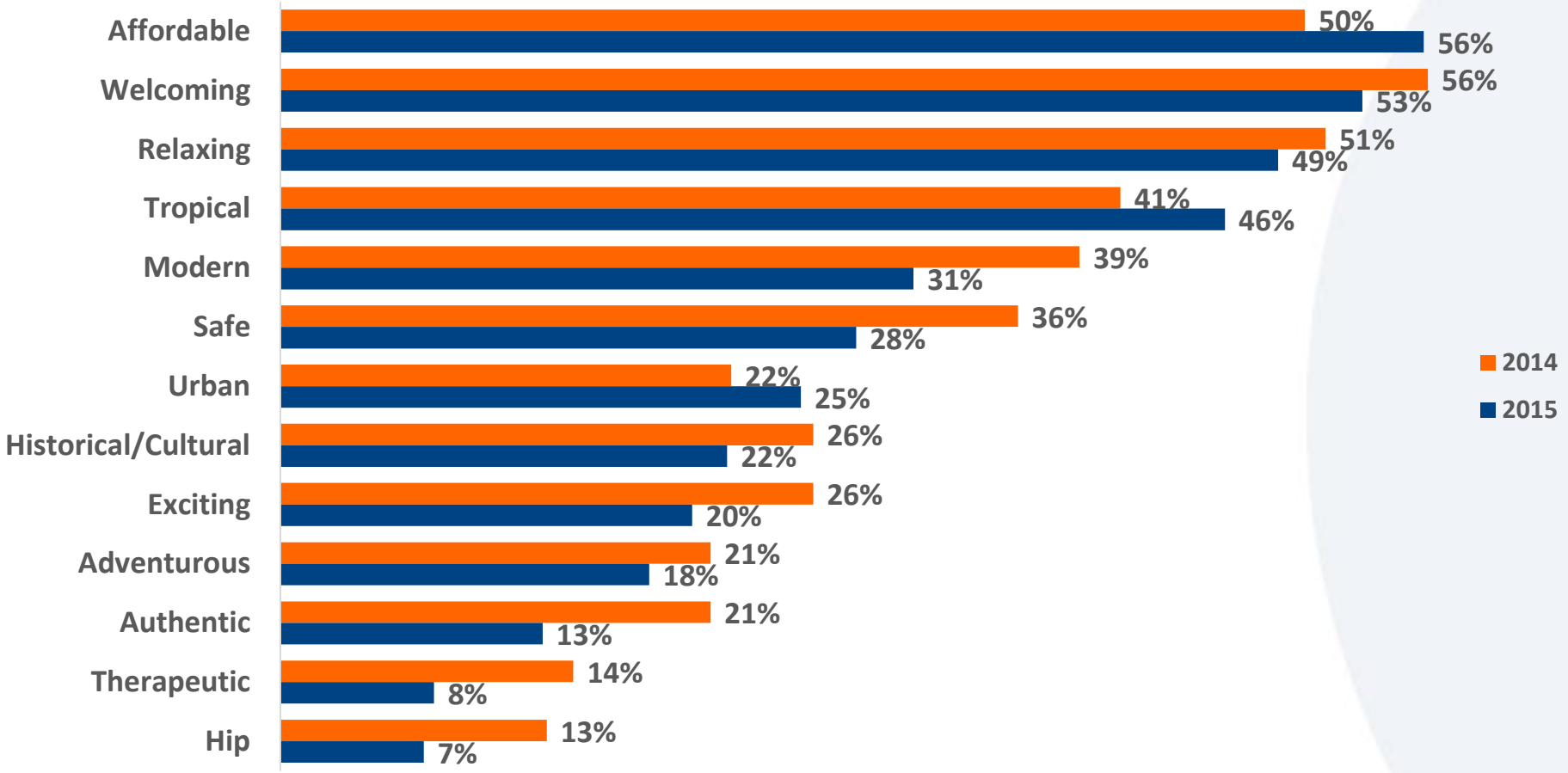


Q10: In the past 3 years, which months have you visited Tampa?
Q11: How many trips did you make to the Tampa area in the past 12 months?

RESPONDENT BASE: TAMPA BAY VISITORS LAST 3 YEARS | N=256

Tampa Bay Characteristics

Visitors tend to describe the city of Tampa with words such as affordable, welcoming and relaxing, but are less likely to view it as hip, therapeutic or authentic. There were notable gains in the perceptions of affordability and tropical.

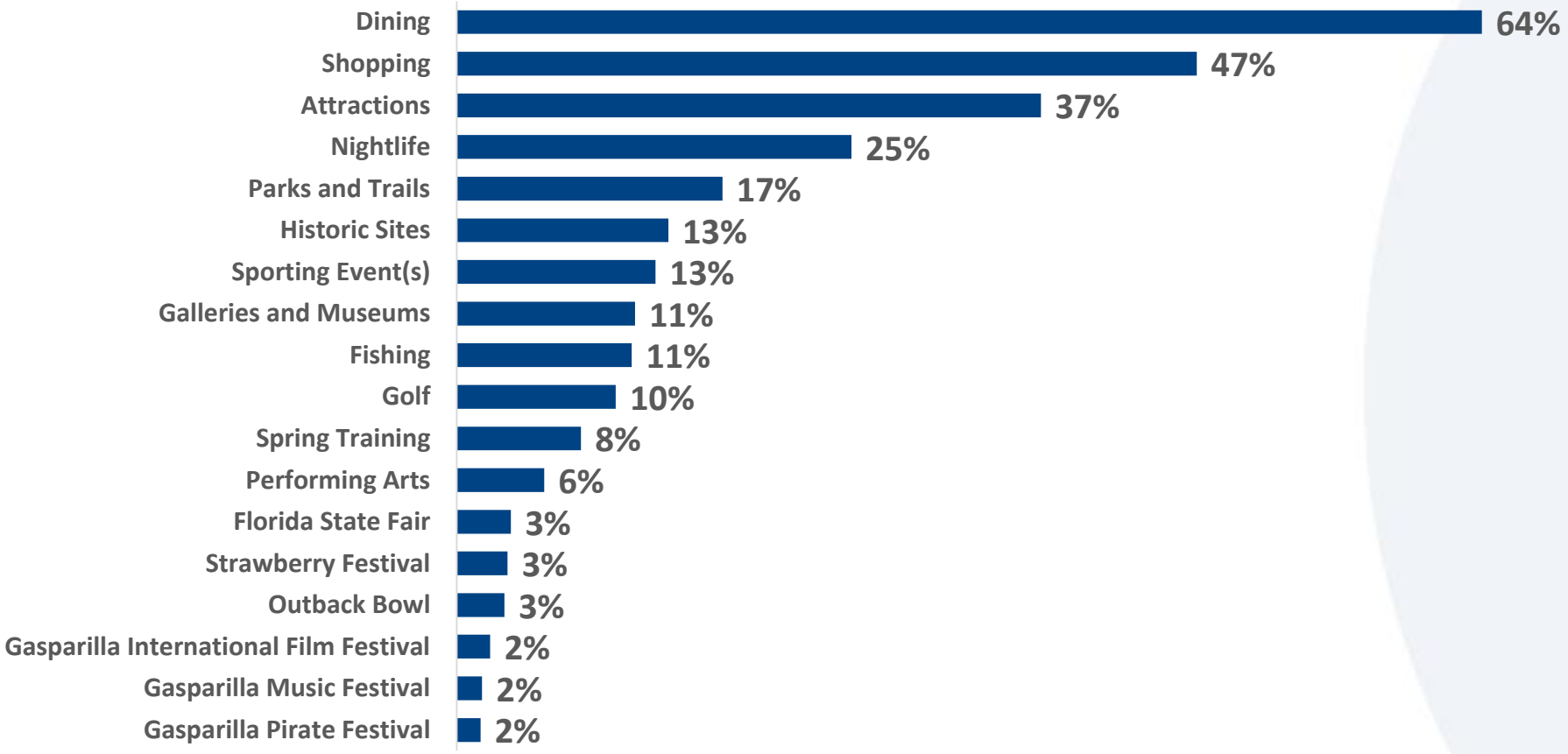


Q9: Please indicate which of the following characteristics you believe best describe the city of Tampa:

RESPONDENT BASE: TAMPA BAY VISITORS LAST 3 YEARS | N=256

Area Activity Participation

While dining and shopping are staples for travelers in most destinations, Tampa Bay visitors also include area attractions and nightlife when they visit the area.



Q12: Which of the following activities or experiences, if any, did you participate in on your most recent visit to the Tampa area?

RESPONDENT BASE: TAMPA BAY VISITORS LAST 3 YEARS | N=256

Functional Drivers of Visitation

The biggest functional drivers, or activities most likely to get people off the sofa, are Tampa Bay's attractions, dining, shopping and sporting events. Sporting events rose in popularity as a driver this year from 7th to 4th place as sports tourism is becoming more popular in the area.

Attractions

25%

Dining

20%

Shopping

12%

Sporting Event(s)

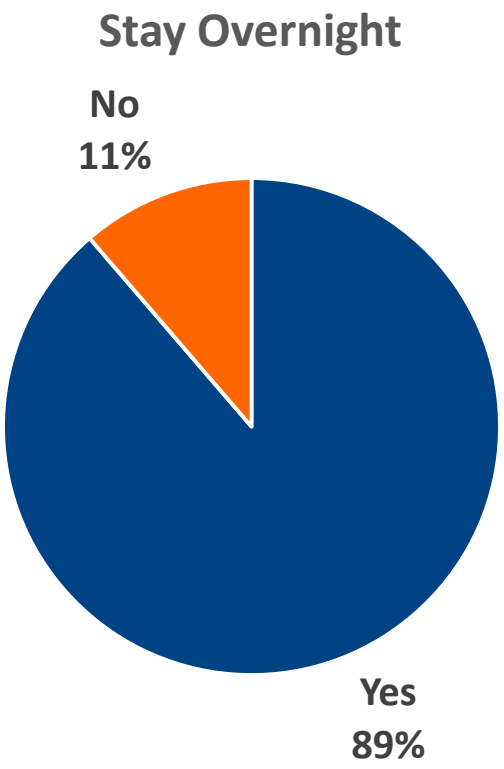
8%

Q13: Of these activities, please indicate if there were any that were a major influence in your decision to visit Tampa on this most recent trip.

RESPONDENT BASE: VISITORS WHO PARTICIPATED IN ACTIVITIES | N=233

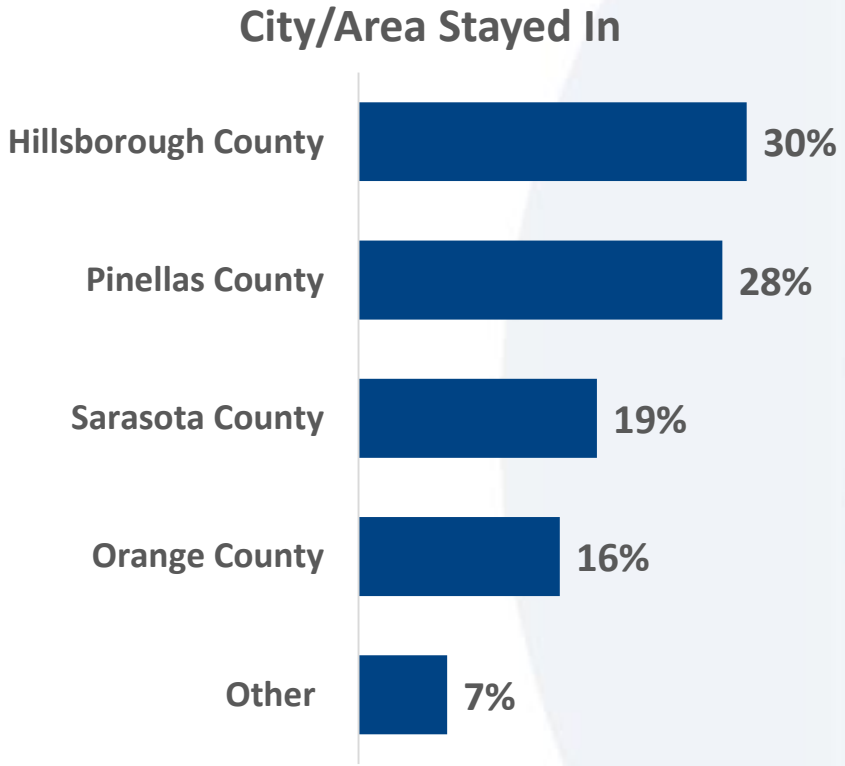
Overnight Visitors

The majority of Tampa Bay visitors spent the night on their last visit to the area and stayed an average of 4.2 nights. Approximately 30% stayed in Hillsborough County (including Tampa) while others stayed in the surrounding area.



RESPONDENT BASE: TAMPA BAY VISITORS LAST 3 YEARS | N=256

4.2
Nights in the Area

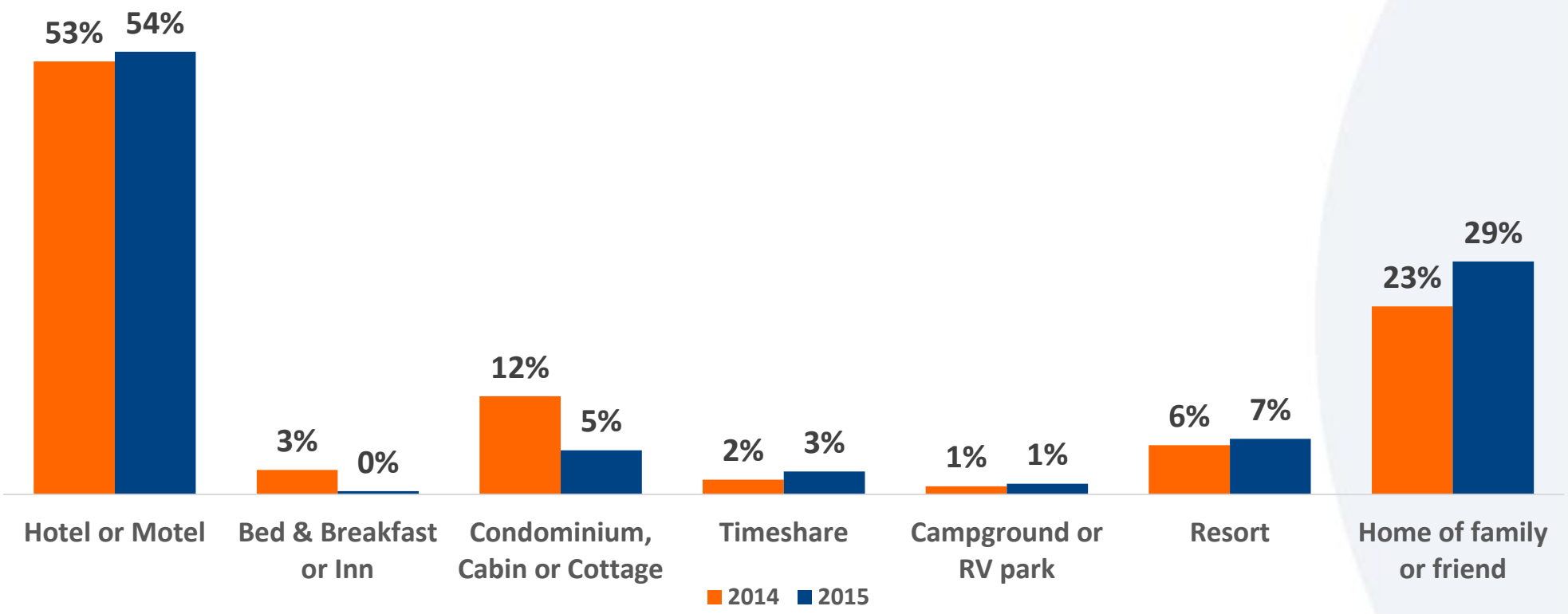


RESPONDENT BASE: ALL OVERNIGHT VISITORS | N=244

Q15: How many nights did you spend in the area on this trip?
Q16: In which of the following cities/areas did you spend the night on your most recent visit to the Tampa area?

Accommodations Used

The majority of those who stayed overnight in Tampa Bay chose to stay in a hotel/motel or the home of family or friends. Both of these accommodations saw increases compared to last winter.

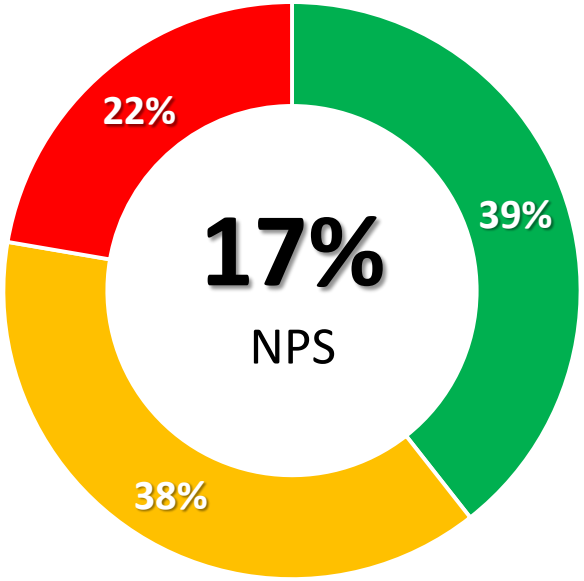


Q17: Which of the following best describes the type of accommodations you used on your most recent trip?

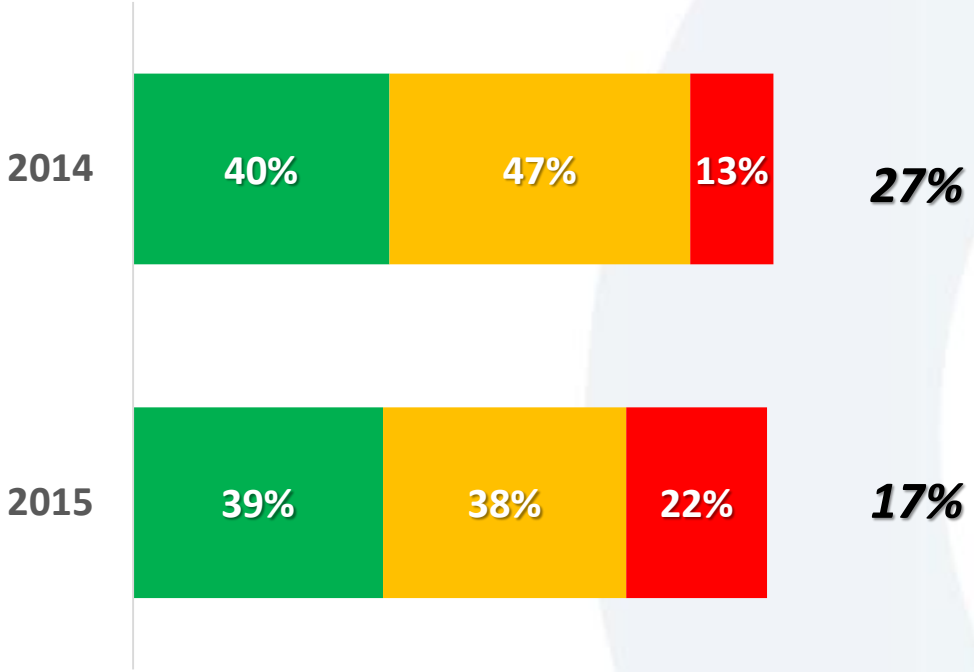
RESPONDENT BASE: OVERNIGHT VISITORS WHO STAYED IN TAMPA | N=68

Net Promoter Score (NPS)

Tampa Bay's Net Promoter Score among recent visitors dropped significantly (-10%) compared to 2014. This decline was fueled by an increase in detractors, mostly coming from the neutral category.



Promoters (9-10) Neutrals (7-8) Detractors (0-6)



Promoters (9-10) Neutrals (7-8) Detractors (0-6)

Q20: How likely are you to recommend the Tampa area to a friend or family member?

RESPONDENT BASE: TAMPA BAY VISITORS SINCE JANUARY 2015 | N=94

Demographic Profile of Tampa Bay Visitors

Tampa Bay's prospects and brand advocates are more likely to have children and earn higher household incomes than non-visitors. Interestingly, recent visitors live the farthest away while brand advocates live the closest.

	Visitors Since Jan 2015	Non-Visitors	Prospects*	Brand Advocates**
Respondent Age	48	48	47	49
Children in the Home	30%	22%	34%	33%
No Children	70%	78%	66%	67%
Males	44%	41%	45%	28%
Females	56%	59%	55%	72%
HH Income	$113.0k	$95.0k	$96.1k	$107.9k
Distance	996 miles	969 miles	967 miles	915 miles
% College Graduate +	72%	75%	54%	79%

**Prospects are non-visitors who intend to visit the area after viewing the digital ads.*
***Brand advocates are visitors who rated NPS for Tampa Bay 9 or 10 and will probably/definitely return.*

Thank You!

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